



## **Tips To Maintain Ownership of Your Funds**

- Maintain a list of all your bank accounts, securities interests, stocks, bonds, mutual funds, insurance companies, safe deposit boxes, rent and utility deposits and the financial institution's or company's contact information.
- Maintain contact with financial institutions and companies by notifying them of address changes, name changes, or changes in ownership due to death or divorce, etc.
- Keep accounts active by making a withdrawal or deposit at least once a year.
- Respond to due diligence letters sent by financial institutions and corporations.
- Provide your financial institutions with a secondary contact or beneficiary contact name and information.
- Make photo copies of all important documents and make sure your family knows where they are located.
- Cash dividend, interest, or refund checks promptly.
- Be aware of lease expiration dates and rental fees that may be due on a safe deposit box and pay them in a timely manner.